

Registered Legal Executive Estates

Objective: To provide high quality legal services to the clients of Pitt & Moore as part of the Trusts & Estates team.

Key Relationships

Internal: Partners, solicitors and other legal executives and support staff

External: Clients and relevant external bodies and/or agencies and third parties

Legal work

The Legal Executive will:

- carry out estate administration from initial contact with executors/clients to final distribution. This work will include (but is not limited to):
 - liaising and meeting with Trustees and Executors and family members as appropriate
 - searching Landonline, Companies Office and PPSR in regard to estate assets and liabilities
 - liaising with external organisations relating to estate assets and liabilities and with accountants in relation to financial and tax matters
 - drafting and submitting applications to High Court for Grant of Probate and Letters of Administration
 - preparing appropriate LINZ documentation with support if necessary from other team members (e.g. Transmissions, statutory declarations, transfers)
 - drafting Trust Account Statements and Statements of Distribution
 - obtaining Verification of all client/beneficiary bank accounts required for distribution, setting up payments (and assisting AML officer with AML requirements as necessary)
 - attending to distribution of estates to Beneficiaries
 - reporting to Executors, Trustees and Beneficiaries as appropriate
- manage and report on ongoing estates (which may have will trusts or life interests)
- work collaboratively to support litigation in dealing with any contentious estate matters
- provide advice in relation to estate planning matters generally
- draft and attend on clients in relation to simple and complex wills
- draft and attend of clients in relation to general and enduring powers of attorney and deeds of delegation
- review Trust documentation relating to or connected with an estate and prepare Trust documentation such as Deeds of Retirement and Appointment of Trustees and Deed Recording Death of Trustee (full support and guidance will be provided for any trust work arising)

Accountabilities and other tasks

In carrying out the above the Legal Executive will:

- record time efficiently in line with budget expectations and achieve individual and team fee budgets
- ensure documents are prepared accurately and in line with firm standards, protocols and instructions
- carry out work in a timely manner, within deadlines and appropriate time frames
- keep files up to date and all correspondence and documentation accurately saved in the firm's document management system
- be positive and professional in all interactions with colleagues, clients and third parties
- seek assistance and guidance from supervisor(s) where needed but otherwise be self-managing with own files
- assist with month billing/invoicing of own files (PA support provided for this process)

Other Expectations

The Legal Executive will also:

- attend staff, team and fee earner meetings
- assist with other work as necessary to help other team members during busy period
- contribute ideas to improve efficiency and productivity of our firm's systems and processes
- be an active contributor to the team, supporting colleagues who need help and build positive working relationships
- actively participate in your continued professional development
- attend training courses, on the job and self-directed learning
- work in a safe manner and follow all reasonable instructions, adhering to our firm policies and procedures in relation to health and safety matters
- take on any other duties that may be required from time to time

Qualifications

Registered Legal Executive with NZILE (Associate or Fellow)